

ON-SITE REVIEW CHECKLIST
ASSESSMENT OF THE MEAL COUNTING AND CLAIMING SYSTEM

According to 7 CFR 210.8(a)(1), every school year, **prior to February 1**, each sponsor with more than one site (as defined 7 CFR Part 210.2 to include Residential Child Care Institutions (RCCIs)) must perform no less than one on-site review of the lunch counting and claiming system employed by each school under its jurisdiction.

Each on-site review must ensure the school's claim is based on the counting system, as implemented, and yields the actual number of reimbursable free, reduced price, and paid lunches, respectively, served for each day of operation.

If the review discloses problems with a school's meal counting or claiming procedures, the sponsor must ensure that the school implements corrective action, and within 45 days of the review conduct a follow-up on-site review to determine that the corrective action resolved the problems.

School Name: _____ **Review Date:** _____

Sponsor Reviewer: _____

The following questions are recommended at a minimum to complete the on-site review requirement:

YES NO

- | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <input type="checkbox"/> | <input type="checkbox"/> | 1. Is the method used for counting reimbursable meals in compliance with the approved <i>point of service</i> requirement? (Meal counts must be taken at the location where complete meals are served to children.) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Is the <i>point of service</i> meal count used to determine the school's claim for reimbursement? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Is the person responsible for monitoring meals correctly identifying reimbursable meals for the menu planning option selected by the SFA? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Is the school correctly implementing policies for handling the following (as applicable): | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | <table border="0"><tr><td>Yes</td><td>No</td><td>N/A</td><td></td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Incomplete meals?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Second meals?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Lost, stolen, misused, forgotten or destroyed tickets, tokens, IDs, PINs?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Visiting student meals?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Adult and non-student meals (and identifying program vs. non-program)?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>A la carte?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Student worker meals?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Field Trips?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Charged and/or prepaid meals?</td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td>Offer vs. Serve?</td></tr></table> | Yes | No | N/A | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Incomplete meals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Second meals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Lost, stolen, misused, forgotten or destroyed tickets, tokens, IDs, PINs? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Visiting student meals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Adult and non-student meals (and identifying program vs. non-program)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A la carte? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Student worker meals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Field Trips? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charged and/or prepaid meals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Offer vs. Serve? |
| Yes | No | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Incomplete meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Second meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Lost, stolen, misused, forgotten or destroyed tickets, tokens, IDs, PINs? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Visiting student meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Adult and non-student meals (and identifying program vs. non-program)? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A la carte? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Student worker meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Field Trips? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charged and/or prepaid meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Offer vs. Serve? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Is there a method of identifying non-reimbursable meals (i.e. not meeting meal pattern requirements, seconds, adult meals, etc.), distinguishing them from reimbursable meals? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

- ☐ ☐ 6. Is someone trained as a backup for the monitor and the meal counter?

YES NO

- ☐ ☐ 7. Are there procedures for meal counting and claiming when the primary counting and claiming system is not available and do staff know when and how to implement it?
- ☐ ☐ 8. Are daily counts correctly totaled and recorded?
- ☐ ☐ 9. If claims are aggregated, are the meal counts correctly totaled and consolidated?
- ☐ ☐ 10. Are internal controls (edits, monitoring, etc.) established to ensure that daily counts do not exceed the number of students eligible or in attendance and that an accurate claim for reimbursement is made? Record today's meal counts by category and compare to the number of students eligible by category.

Number of Students Approved by Category Today's Meal Counts by Category

Free:

Free:

Reduced price:

Reduced price:

Paid:

Paid:

- ☐ ☐ 11. Does the system prevent overt identification of children receiving free or reduced price meals?

**NOTE: THE FOLLOWING TWO QUESTIONS ARE FOR ALL SPONSORS
EXCEPT FOR SPONSORS ON PROVISION 2 OR 3 IN NON-BASE
YEARS OR RCCIs WITH ONLY RESIDENTIAL CHILDREN:**

- ☐ ☐ 12. Is a current eligibility list kept up-to-date and used by the meal count system to provide an accurate daily count of reimbursable meals **by category** (free, reduced price, paid)?
- ☐ ☐ 13. If applicable according to 7 CFR 210.8(a)(3), are edit checks completed and documented which compare the daily counts of free, reduced price and paid lunches against the product of the number of children currently eligible for free, reduced price and paid lunches, respectively, times an attendance factor (and any discrepancies accounted for)?

CORRECTIVE ACTION PLAN (for above “NO” answers):

SPECIFY DATE CORRECTIVE ACTION(S) WILL BE IMPLEMENTED: _____

BY WHOM: _____

SIGNATURE: _____
 School Representative **Title** **Date**

 Sponsor Reviewer **Title** **Date**

FOLLOW-UP VISIT (must be conducted within 45 days if corrective action was required):

Observations of corrective action implementation:

SIGNATURE: _____
 School Representative **Title** **Date**

 Sponsor Reviewer **Title** **Date**